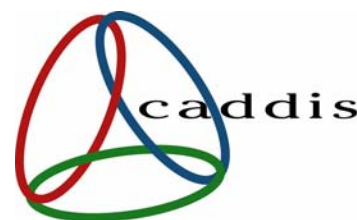# CADDIS Connection

Department of Developmental Services

Business Process Planning (BPP) Update

Over the last several months, the CADDIS BPP Team has been busy preparing the RCs for CADDIS through a variety of methods including the BPP Sessions, BPP Debrief Calls, and RC Readiness Meetings.

BPP Sessions

The BPP sessions included representatives from several RCs who participated in developing business process recommendations and considerations. A total of six sessions were held for each CADDIS module: Consumer, Provider, Quality Assurance, POS, Trust, and Fiscal. The results of the BPP sessions will be provided to each RC on August 15, 2005 as part of the CADDIS Standard Business Process Model. Each RC will use the Standard Model to develop its own customized business processes prior to CADDIS implementation.

BPP Debrief Calls

During each BPP session, the Team recorded questions and issues from the session's participants. In an effort to formally discuss and resolve these outstanding items, the Team initiated BPP Debrief Conference Calls. The objectives of the debrief calls were to finalize the list of outstanding issues and questions that arose during the BPP sessions, and provide either an update or resolution to each of the issues and/or questions. In addition, the debrief calls served as a "last call" for any additional updates to the To Be Process Flows and Recommendations and Considerations Matrix.

RC Readiness Meetings

A subset of the Implementation Team visited six RCs around California to give an overview of the RC Readiness Process, Business Process Planning, and Training. All 21 RCs were invited to send participants to one of these sessions. These meetings helped clarify implementation related responsibilities, as well as answered many questions about the CADDIS project. During these meetings, the BPP Team introduced several BPP-related tools and templates, and highlighted the major activities that each RC will need to engage in to customize the Standard Business Process Model.

What's Next?

Each RC will be responsible for a number of tasks that will help them to be prepared for a successful CADDIS implementation. Some of the BPP next steps for the RCs include:

- Identifying a BPP Lead and support team

- Reviewing the CADDIS Standard Business Process Model **(To be delivered to the RCs on August 15, 2005)**

- Developing your BPP approach and schedule – How will you get your BPP work completed? When will activities occur?

- Completing the Gap Analysis template and preparing for changes –Identify the differences between how you do things now and how you will do things when CADDIS arrives

- Participating in BPP activities (e.g., monthly conference calls)
Collaborating with other RCs for best practices and lessons learned – Find out what other RCs are doing to prepare for CADDIS implementation

If you have any questions about the BPP Process, please ask your RC's CADDIS Contact.

July 2005

FAQ

Q: Do RC staff need to be trained on using the revised CDER Evaluation Element before they receive CADDIS training?

A: Yes, RC staff needs to be familiar with the revised CDER prior to CADDIS training. RCs build this training into their CADDIS readiness plans. CDER Train-the-Trainer sessions were provided to key RC staff in 2003/2004 and training materials, including a presentation on CD, were distributed at that time. The revised CDER Evaluation Element and the training manual are available on the DDS home page at www.dds.ca.gov/CDER.   Additional copies of the CD will be made available upon request. The CADDIS Associates will work with the RCs to coordinate any further assistance that may be needed.

DDS RC CADDIS Support Teams

DDS has created a CADDIS support team for each RC, consisting of a CADDIS Associate, Go-Live Support person and Management Support person. Each support team will assist its RC through the readiness process, be onsite during and after Go-Live, and provide management support to resolve issues, mitigate risks and offer any other kind of support needed.

The CADDIS Associate is a dedicated resource from the CADDIS Project Team who will support CADDIS implementation efforts at the RC. He/She will be the single point of contact between RC Project Management and CADDIS Project Management for RC implementation status. CADDIS Associates will operate from the CADDIS Project in Sacramento and travel to their RCs as deemed necessary by CADDIS Project management.

The Go-Live Support person is a CADDIS Help Desk staff member. He/She will travel to the RC just prior to Go-Live and provide support for two weeks. This team member will either be able to answer CADDIS functional questions directly or know whom to call for an answer. (A Deloitte team member will also be at each RC to provide technical support).

The Management Support person (in some cases also the CADDIS Associate for that RC) is a representative of DDS management who will either assist in resolving issues or escalate them to upper management, help to mitigate risks and provide any other kind of support the RC needs for a successful and smooth implementation.

See the attached schedule for your RC's complete support team:

CADDIS Associates	Go-Live Support	Management Support
Sue Boucher	Judy Callahan	Sue Boucher
Judy Callahan	Terry Jew	Beverly Humphrey
Cheryl Holden	Todd Golterman	Kathy Owen
Kathy Owen	Judi Maus	Becky Pipoly
Steven Rodriguez	Barbara Rogers	
Tamara Wheeler		
Jeanne Yuen-Gong		

Regional Center Training and Go-Live Schedule

Regional Center	CADDIS Associates	Go-Live Support	Management Support	Sys Admin Training / CCT Training / Go-Live dates
Inland	Judy	Terry	Becky	7/1-7/13, 7/25-8/5, 11/28
Valley Mountain	Jeanne	All	Becky	7/18-7/20, 7/25-8/5, 11/28
Tri-Counties	Judy	Judi	Becky	9/26-9/28, 10/10-10/21, 1/23
Redwood Coast	Tamara	Todd	Becky	10/10-10/12, 10/24-11/4, 1/30
East LA	Steven	Terry	Bev/DPM	10/17-10/19, 10/24-11/4, 1/30
Kern	Cheryl	Barbara	Bev/DPM	10/24-10/26, 11/7-11/18, 2/21
San Diego	Sue	Terry	Becky	10/31-11/2, 11/7-11/18, 2/21
San Gabriel	Judy	Judi	Becky	11/14-11/16, 11/29-12/9, 2/27
Central Valley	Steven	Todd	Bev/DPM	11/16-11/18, 11/28-12/9, 2/27
North Bay	Kathy	Terry	Kathy	11/21-11/23, 12/12-12/22, 3/20
Alta	Jeanne	Barbara	Becky	11/28-11/30, 12/12-12/22, 3/20
Far Northern	Steven	Todd	Bev/DPM	12/5-12/7, 1/2-1/13, 3/27
North LA	Kathy	Judi	Kathy	12/12-12/14, 1/2-1/13, 3/27
East Bay	Cheryl	Terry	Bev/DPM	1/3-1/5, 1/16-1/27, 4/3
Golden Gate	Sue	Judy	Sue	1/16-1/18, 1/30-2/10, 4/24
San Andreas	Cheryl	Barbara	Bev/DPM	1/23-1/25, 1/30-2/10, 4/24
Harbor	Kathy	Todd	Kathy	1/30-2/1, 2/13-2/24, 5/1
Lanterman	Judy	Judi	Becky	2/6-2/8, 2/13-2/24, 5/1
South Central LA	Sue	Terry	Sue	2/13-2/15, 2/27-3/10, 5/22
Westside	Steven	Judy	Bev/DPM	2/20-2/22, 2/27-3/10, 5/22
Orange County	Cheryl	Barbara	Bev/DPM	2/27-3/1, 3/13-3/24, 5/30

Timeline: 2005 (Q2 June, Q3 July August September, Q4 October November December) — 2006 (Q1 January February March, Q2 April May June)

Standard To-Be Business Process Model Delivered 8/15

Legend: ◆ Sys Admin Training   ▭ CCT Training   ✦ Go-Live

RC Readiness Profile

This article is the first in a series, profiling how individual RCs are preparing for CADDIS. If you want to share what your RC is doing, talk to your CADDIS Contact about being included in the series.

<u>Central Valley Regional Center – Chomping at the Bit</u>

CVRC wasn't always enthusiastic about CADDIS. As with any major change, there was some initial resistance to CADDIS and trepidation about how it will change the way CVRC does business. CVRC's leaders, however, were very clear about the fact that CADDIS was on its way and CVRC needed to make the best of it.

To increase their knowledge of how CADDIS works, CVRC's managers attended any CADDIS demos, orientations, meetings and testing sessions to which they were invited. In June, 2003, CVRC management attended a Toolkit session in San Diego. At the session, CVRC and the other attending RCs learned about the business planning process, how to document workflows and how to compare their current (As-Is) processes to the future (To-Be) CADDIS processes. Unfortunately, because CADDIS wasn't fully designed at that time, RCs had to rely on what they had learned at CADDIS demos and what they had read in the CADDIS design specs to decipher how CADDIS would change their business processes. There was a lot of frustration about not quite knowing how CADDIS was going to work and, thus, not being fully confident their To-Be processes were correct.

CVRC sat down for their Certified CADDIS Training (CCT) in January, 2004, ready to finally get their hands on CADDIS. Their enthusiasm was dealt a blow when CCT was cancelled and go-live was postponed. The momentum they had built over the preceding months was seriously in danger of grinding to a halt. Fortunately, they found a silver lining in the fact that those who were enrolled in CCT training were given access to the CADDIS "Sandbox", an environment where they could "play" and get further acquainted with CADDIS functionality. Normally, access is only given to those who complete CCT or user training.
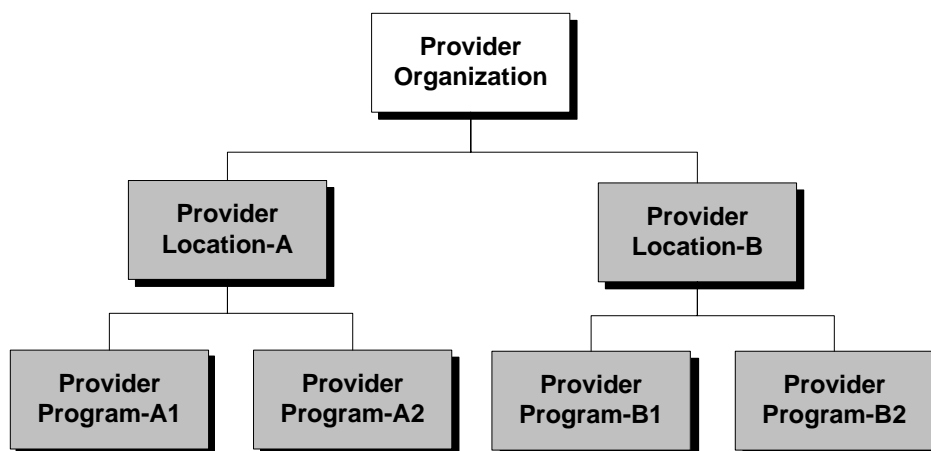
This experience proved extremely important. Finally armed with what CADDIS really looked like and how it worked, the Toolkit attendees found new energy and resumed their work on the To-Be processes with renewed enthusiasm. The Toolkit attendees viewed the business planning process as an exercise in organizational change. They enlisted (sometimes coerced) the participation of all managers in the toolkit process. Key managers were given lead responsibility for development and coordination of toolkits and flowcharts. Their experience in the CADDIS Sandbox was very helpful when they began documenting their To-Be processes. These toolkit leads and other process planning participants presented the toolkits and flowcharts their workgroups developed to a core team of four (Robert Riddick/ Associate Director, Carmen Villegas/Director of Administrative Services, Ed Araim/Systems Manager and Chris Norrdin/Program Manager). The core team reviewed and critiqued each and every one of the 60 or so processes from both quality assurance and overall agency workflow perspectives. The resulting toolkits can be found on CVRC's CADDIS website (info.cvrc.org), along with a link to the CADDIS Design Page, a list of CADDIS menus, CADDIS Connection newsletters and much more.

The leadership at CVRC has put much effort into not only the toolkits, but learning as much as they can about CADDIS and then sharing it with their staff. CVRC is ready for CADDIS and willing to share their lessons learned, and enthusiasm, with other RCs.

If you have any questions about CVRC's preparation for CADDIS, you can call Ed Araim at (559) 276-4401 or Chris Norrdin at (559) 276-4320.

Did You Know?

Did you know that in CADDIS, Vendors are called Providers and they have a three-tiered hierarchy?
In CADDIS, Providers are the external service providers currently called "vendors". CADDIS uses a three level structure for Providers.

```
                          ┌─────────────────┐
                          │    Provider     │
                          │  Organization   │
                          └─────────────────┘
                    ┌──────────────┴──────────────┐
          ┌─────────────────┐           ┌─────────────────┐
          │    Provider     │           │    Provider     │
          │   Location-A    │           │   Location-B    │
          └─────────────────┘           └─────────────────┘
          ┌───────┴───────┐             ┌───────┴───────┐
    ┌───────────┐  ┌───────────┐  ┌───────────┐  ┌───────────┐
    │ Provider  │  │ Provider  │  │ Provider  │  │ Provider  │
    │Program-A1 │  │Program-A2 │  │Program-B1 │  │Program-B2 │
    └───────────┘  └───────────┘  └───────────┘  └───────────┘
```

- **Provider Organization**: A Provider Organization describes the corporate or umbrella organization that manages a single or multiple Provider Locations, Programs and Staff.

- **Provider Location:** Provider Location is the second level of the Provider hierarchy in CADDIS. Provider Location describes information related to a physical address or location where services are provided to Consumers.

Critical data associated with Provider Locations include associated Provider Programs, address records, physical characteristics, licenses and insurance policies related to the physical address.

- **Provider Program:** Provider Programs are at the base of the hierarchy. A Provider Program describes the service offered to Consumers. A Provider Program cannot be created unless the Provider Organization and Location are associated to it. Provider Programs are unique to Provider Locations.

For example, you may have a Provider Organization called North Valley Residential Services that has two Locations - Bob's Residential Services and Northgate Residential Services. These two Locations could each provide multiple Programs, such as Adult Residential Services, Out-of-Home Respite, One-to-One Program Support and Transportation. These records are kept separately in CADDIS but are grouped under one Organization, enabling you to retrieve all of the information relating to a Provider Organization.

NOTE: If a particular Provider Organization is a family member or Consumer, a specific Consumer can be associated to the record; however, only the Consumer ID will display for confidentiality purposes.

The Provider structure in CADDIS allows for more efficient management of information, reduced data entry and no redundant records. For example, when an Organization adds new Locations or Programs, the Organization information does not need to be entered again; only the new information regarding the Location or Program needs to be added.

Do you have a suggestion for a CADDIS Connection article or FAQ?
We want to hear it!
Please send your suggestions to Tamara Wheeler, DDS CADDIS Project, at twheeler@dds.ca.gov